



U. S. Small Business Administration

DISASTER BUSINESS LOAN APPLICATION

Filing Requirements for Hurricanes Katrina & Rita Only

The following requirements (1 through 4) must be submitted with your Disaster Business Loan Application (SBA Form 5).

1. Copies of the applicant's most recently filed Federal Income Tax Returns, including all schedules, if available. Also, complete and sign the Tax Information Authorization (IRS Form 8821). Sole proprietors need only submit the IRS Form 8821. We will contact you if we need any additional information (i.e., forecasts, etc.).
2. If available, provide a current (dated within 90 days of application) business balance sheet (you may use the Personal Financial Statement (SBA Form 413) if you are a sole proprietorship), a current profit and loss statement, and a current Schedule of Liabilities (SBA Form 2202).
3. For: 1) each proprietor; or 2) each limited partner who owns 20% or more interest and each general partner; or 3) each stockholder or entity owning 20% or more of voting stock, a current (dated within 90 days of application) personal financial statement (you may use SBA Form 413 for this purpose). Entities (except sole proprietorships) must also submit a complete copy, including all schedules, of the entity's most recent Federal Income Tax Return, if available.
4. A complete copy, including all schedules, of the latest Federal Income Tax Return for each affiliate, if available. Affiliates include, but are not limited to business parents, subsidiaries, or other businesses with common ownership or management. An authorized individual must complete and sign the attached IRS Form 8821 for each affiliate.
5. If available, include a copy of your proof of loss and a copy of the declaration page of your insurance policy, if your insurance covers all or a part of the loss (regardless of the current status of your claim).

IF SBA APPROVES YOUR LOAN, WE MAY REQUIRE ADDITIONAL INFORMATION BEFORE LOAN CLOSING. WE WILL ADVISE YOU, IN WRITING, OF WHAT DOCUMENTS WE NEED.

**Please make sure to download the Hurricane Katrina or Hurricane Rita
Disaster Fact Sheet for general program information**